Oracle® Retail Brand Compliance Management Cloud Service

Supplier User Guide

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Oracle Retail Brand Compliance Management Cloud Service Supplier User Guide, Release 19.12

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Preface

This document describes the Oracle Retail Brand Compliance Management Cloud Service Supplier user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

> **Note:**
>
> **IDCS Update to Identity Provider**
>
> References in the text or images within this document, to IDCS, IDCS or OCI IAM, Identity Cloud Service, or Identity Management have been replaced by Identity Provider within the actual application.

Audience

This document is intended for the users of the Oracle Retail Brand Compliance Management Cloud Service Supplier module.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Oracle Retail Brand Compliance Management Cloud Service documentation set:

- *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Implementation Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Release Readiness Guide*

- *Oracle Retail Brand Compliance Management Cloud Service User Guide*

For information on the Oracle Retail Brand Compliance Management Cloud Service modules, see the following documents:

- *Oracle Retail Brand Compliance Management Cloud Service Product User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Project User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Reports User Guide*

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Conventions

The following text conventions are used in this document:

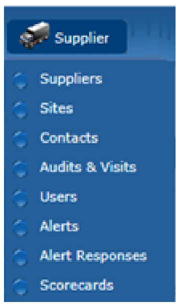
Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1
Introduction

The Supplier module provides capabilities to manage suppliers including the identification, selection, and approval of suppliers.

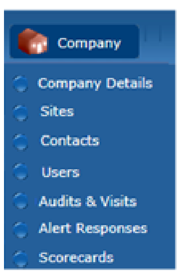
To access a Supplier option, select the option from the Supplier drop-down list.

Figure 1-1 Supplier Drop-Down List



The supplier user accesses the Supplier options through Company rather than Supplier.

Figure 1-2 Supplier Options from Company Drop-Down List



For information on the choices in the drop-down list, see the chapter shown in Table 1-1. For information on the Users option, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

Table 1-1 Description of Supplier Drop-Down Choices

Option	Description	Chapter
Suppliers	Maintenance of the supplier account details.	Supplier Management
Sites	Maintenance of the supplier's individual manufacturing and packing location details.	Site Management

Table 1-1 (Cont.) Description of Supplier Drop-Down Choices

Option	Description	Chapter
Contacts	Maintenance of the individual contacts at the supplier and site locations.	Contacts Management
Alerts and Alert Responses	Process for the retailer/portal owner to issue alerts and manage alert responses.	Alerts Management
Audits & Visits	Management of the regular auditing program for the supplier base.	Audits & Visits
Scorecards	Management of the regular performance assessment program for the supplier base.	Scorecard Management

Available Options Based on Type of User

Retailer and supplier users may have access to the Supplier module. Based on the type of user, the options are typically presented in the following manner:

- Retailer users

  Retailer users see both Company (for the retailer) and Supplier (their suppliers).

  Under Company:

  - Company Details: Name and address details of the retailer.
  - Users: List of all retailer users.
  - Admin: Administration options if the user has access to any options.

  Under Supplier:

  - Suppliers: List of all supplier records.
  - Sites: List of all site records.
  - Contacts: List of all supplier/site contacts for all suppliers and sites.
  - Users: List of all supplier/site users for all suppliers and sites.
  - Audits & Visits: Work with audits and visits if the user has access to that module.
  - Alerts: Work with alerts if the user has access to that module.
  - Scorecards: Work with scorecards if the user has access to that module.
- Suppliers users

  Supplier users see Company (for their organization):

  - Company Details: Supplier record.
  - Sites: List of the supplier's sites with which the user is associated.
  - Contacts: List of the supplier's supplier and site contacts. A site user only sees the contacts for the sites with which they are associated.
  - Users: List of the supplier's supplier and site users. A site user only sees the users for the sites with which they are associated.
  - Audits & Visits: Work with audits and visits if the user has access to that module.

- Alerts: Work with alerts if the user has access to that module.
- Scorecards: Work with scorecards if the user has access to that module.

Authority Profiles

The following authority profiles are available for retailer users to provide access to maintain supplier and site records:

Supplier & Site Administrator

The Supplier & Site Administrator Authority Profile is available to allow retailer users to edit all the fields in a supplier or site record. This authority profile can be assigned to a user role or a specific retailer user.

Supplier User Editor

The Supplier User Editor Authority Profile is available to allow retailer users to edit all the fields in a supplier user record, except for roles and permissions. This authority profile can be assigned to a user role or a specific retailer user.

Supplier Contacts Administrator

The Supplier Contacts Administrator Authority Profile is available to allow retailer users to create, edit, and delete supplier contacts. This authority profile can be assigned to a user role or a specific retailer user.

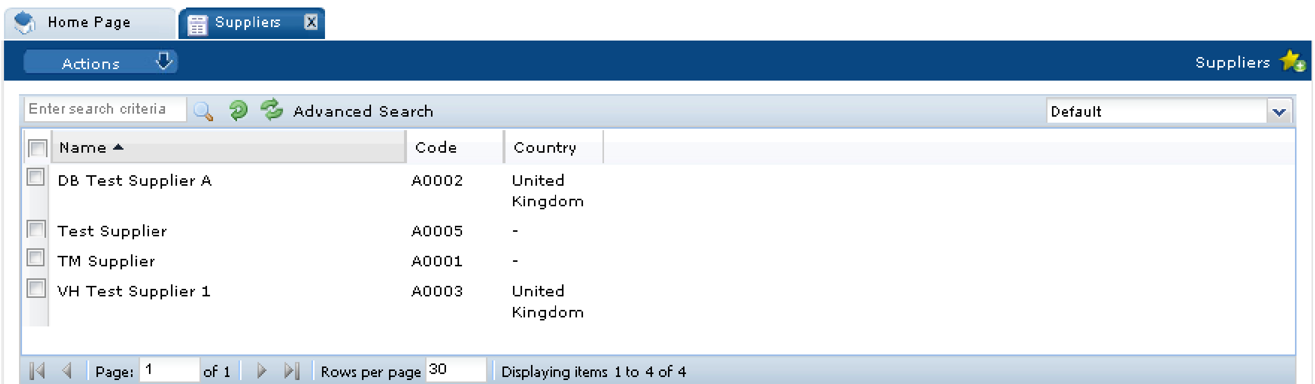
Getting Started

Before using Supplier, be sure that you are familiar with the user interface. If you need more information, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*. This User Guide covers the login, home page, and user interface.

2
Supplier Management

To work with suppliers, select the Suppliers option from the Supplier drop-down list. The Suppliers tab opens. This page shows the list of available suppliers.

Figure 2-1 Suppliers Page



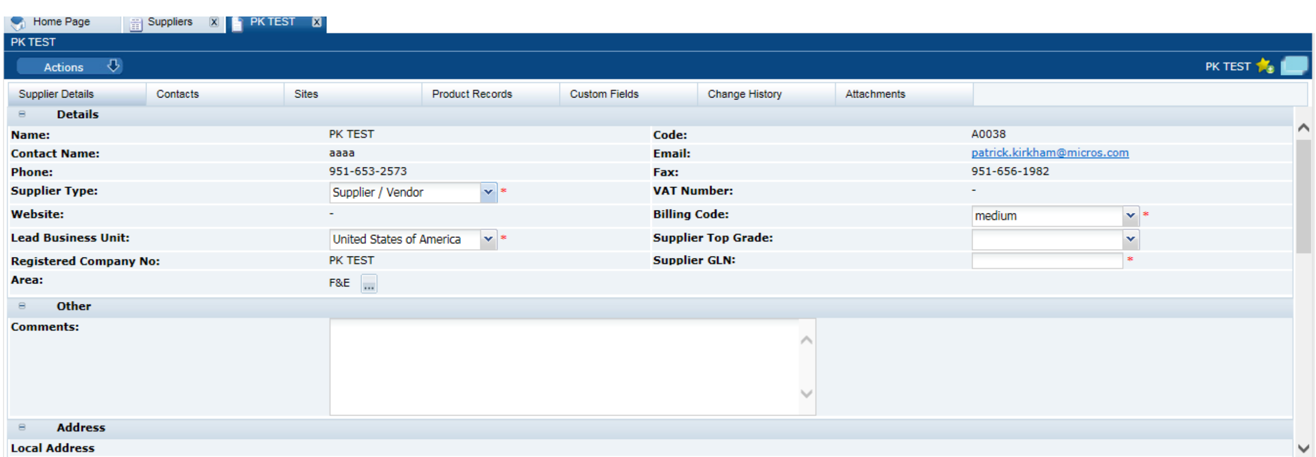
The list shows the suppliers in order by supplier name. For each supplier, the supplier code and country are also shown.

The following actions are available:

- New Supplier: For more information, see Registration.
- New Alert: For more information, see Alerts Management.

To see the details for a specific supplier, double-click the row. A tab opens with the details. You can also select the View or Edit actions.

Figure 2-2 Supplier Details



The following subtabs are available. Select a subtab to see the information for the supplier:

- Supplier Details

  > **Note:**
  >
  > Supplier GLN may be configured to be mandatory, to be of a specific format (such as 13 digits), and to include check digit validation.

- Contacts: List of contacts for the supplier.
- Sites: List of the supplier's site locations.
- Product Records: If Product is purchased and implemented, list of product records.
- Linked Suppliers: If enabled, the number of linked suppliers is shown in parentheses on the subtab.
- Custom Fields
- Change History
- Attachments: List of documents attached to the supplier.

Registration

This section covers the steps for registering a new supplier:

- Adding a Supplier
- Viewing Registration Requests
- Accepting the Registration

All of these steps are pertinent for retailer users. For supplier users, only accepting a registration is a pertinent step.

Adding a Supplier

To add a supplier, select the New Supplier action. The Create Supplier/Site tab opens. From this page, a supplier can be added and sites for the supplier can be defined.

Figure 2-3   Create Supplier/Site Page

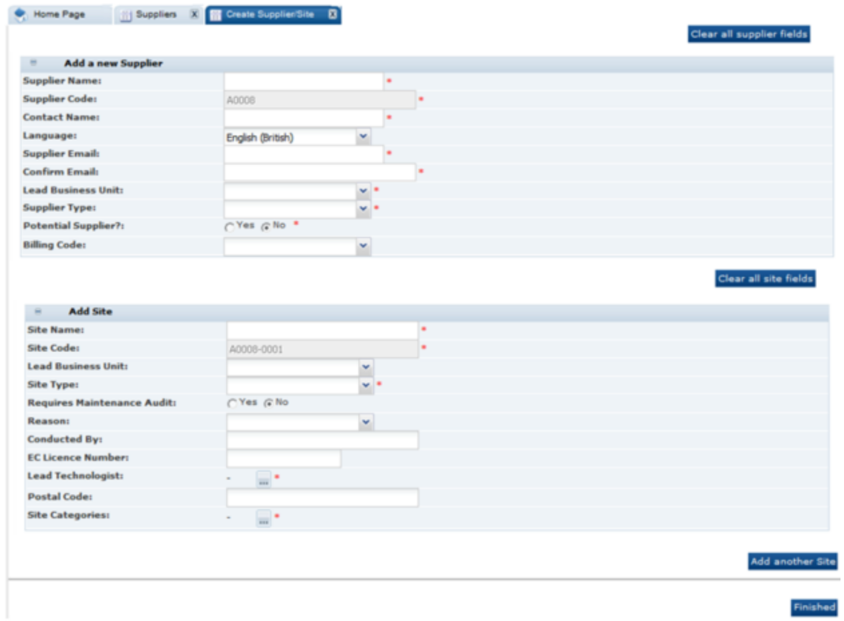


Table 2-1 describes the fields used to add a new supplier.

Table 2-1   Add a New Supplier Fields

Field	Description
Supplier Name	Name of the supplier to be added. Mandatory field.
Supplier Code	Identifies the supplier account. Mandatory field. Depending on the Registration system parameter settings, the code may be automatically assigned by the system, may be automatically assigned and the user permitted to change it, or be manually entered by the user on creation of the account. The format of a supplier code is a letter followed by a 4-digit sequence number with leading zeroes. The supplier codes start from the letter A and 0001. For example, A0001, A0002, and so on. Only retailer users with edit access to Supplier records may change the code (where permitted); validation ensures the code is unique.
Contact Name	Name to be assigned to the first supplier user created. Mandatory field.
Language	Language of the initial supplier user. The language is selected from the list of languages supported for the module. This value defaults to the module's base language. Text is presented in the selected language when the user logs in to complete the registration process and in the initial registration request email.
Supplier Email	An email is sent to this address inviting the first supplier user to complete the registration process. Mandatory field.
Confirm Email	Supplier email address reentered for confirmation. Mandatory field.
Lead Business Unit	Classification of the supplier. Mandatory field.

Table 2-1 (Cont.) Add a New Supplier Fields

Field	Description
Supplier Type	Select the type of supplier from the drop-down list. Mandatory field.
Potential Supplier?	Setting that determines if this supplier is a potential supplier. Potential suppliers are billed when their first site is approved, rather than when registration is completed. The default is No. Mandatory field.
Billing Code	An optional field to assign a billing classification to the supplier. Selection is made from the Billing Codes glossary, but has no functional use within the system.

Table 2-2 describes the fields used to define a site for the new supplier.

Table 2-2 Add a New Site Fields

Field	Description
Site Name	Name of the site to be added. Mandatory field.
Site Code	Identifies the site account. Mandatory field. Depending on the Registration system parameter settings, the code may be automatically assigned by the system, may be automatically assigned and the user permitted to change it, or be manually entered by the user on creation of the account. Other Registration system parameters control the format of the site code and whether it must be unique across the entire portal, or just within its supplier account. The default coding method generates a 4-digit sequence number with leading zeroes, starting from 0001. For example, 0001, 0002, and so on; however, an alpha alternative sequencing such as AAAA, AAAB, and so on, may be used. The site code may also be automatically prefixed with the supplier code, such as A0001-0001. Only retailer users with edit access to Site records may change the code (where permitted); validation ensures the code is suitably unique.
Lead Business Unit	Classification of the supplier.
Site Type	Select the type of site from the drop-down list. Mandatory field.
Requires Maintenance Audit	Settings that determines if a maintenance audit is required. The default is No.
Reason	Select a reason for the maintenance audit.
Conducted By	Name of the person who conducts the maintenance audit.
EC License Number	License number for the site location.
Lead Technologist	Name of the lead technologist for the site location. Mandatory field.
Postal Code	Postal code for this site location.
Site Categories	Select the business category associated with this site. Mandatory field.

To add a new supplier:

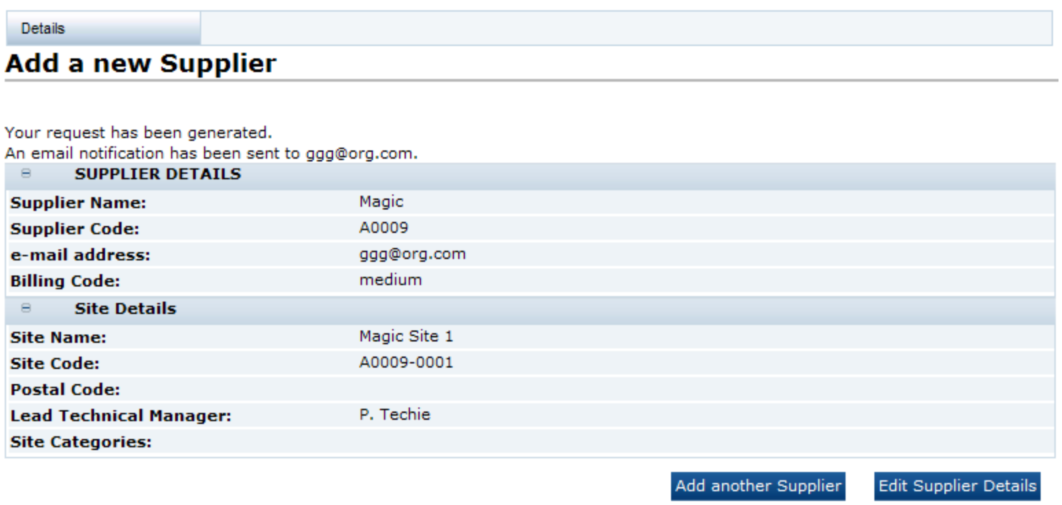
1. Enter the information for the new supplier. For a description of the fields, see Table 2-1.
2. Enter the information for a site for the supplier. For a description of the fields, see Table 2-2.
3. If additional sites are needed, click **Add another site**. An additional section for information for that site appears. See Step 2.
4. When all the information is added, click **Finished**. The supplier and site information is validated.

   If any site within the system contains the same value found within the Postal Code or EC Licence Number fields, the following mandatory field must be completed. The information entered for this field is added to the site's comment field.

Figure 2-4 Reason for This Site Request Field

5. If no errors are found, the Confirmation page appears.

Figure 2-5 Add a New Supplier Confirmation Page



- To add another supplier, click **Add another Supplier**. See Step 1.
- To edit the details shown on the confirmation page, click **Edit Supplier Details**. A tab is opened in edit mode for this supplier.

Upon completion of the registration request, the following is done:

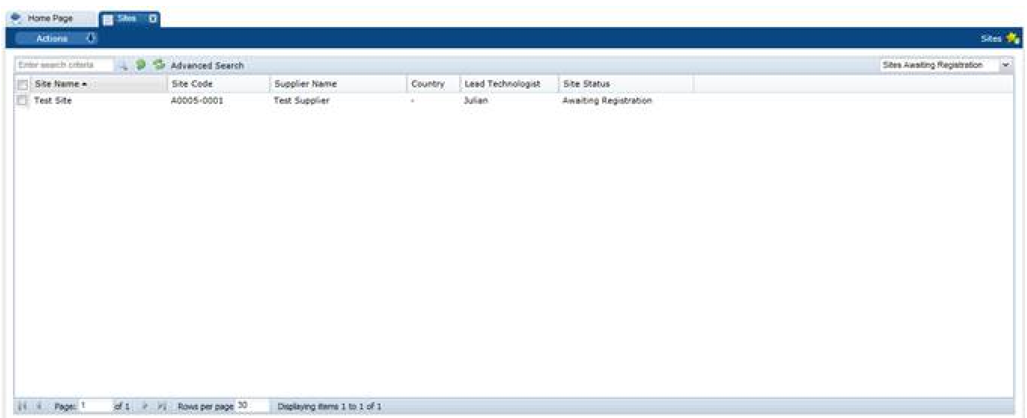
- A Supplier record is created for the supplier with the status set to Awaiting Registration.
- A Site record is created for each site with the status set to Awaiting Registration.
- A User and Person record is created for the supplier contact, using the contact name and email address:

  - The User record has the job role set to Supplier Administrator.
  - The online help option is set to enabled so that any help text is available when the user initially logs in to complete the registration process.
  - The user's language is set to the language selected in the registration request or the default language if none was selected.
  - The EC Licence Number is assigned to the Certificate Number field within the References table against the Reference Type called EC Licence Number.
- A Logon ID is generated from the User Name field. If a person with the same Logon ID exists, an incremental number is added to the end until the Logon ID becomes unique.
- The corresponding IDCS or OCI IAM user profile is created; the user will receive an email, instructing them to set their password in IDCS or OCI IAM.

Viewing Registration Requests

The retailer user can view a list of all registration requests that are waiting to be completed by the supplier by selecting Supplier/Sites and then the Site Awaiting Registration view. Figure 2-6 shows an example of the list.

Figure 2-6 View Registration Requests



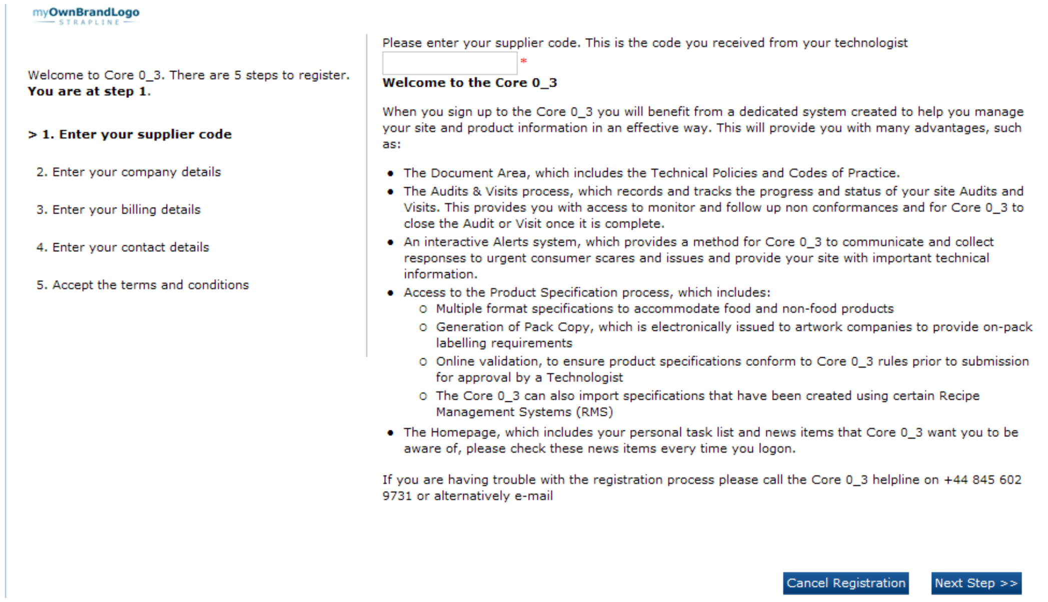
The retailer can send a reminder email message to any suppliers who have yet to complete the registration. To send the reminder, select the Re-send Registration Request action. The email message is not sent if the supplier has already registered.

Accepting the Registration

To accept the registration request:

1. In the request email message, select the link and log in using the user ID and password.

Figure 2-7 Registration Page



There are five steps in the process. The current step is displayed in bold.

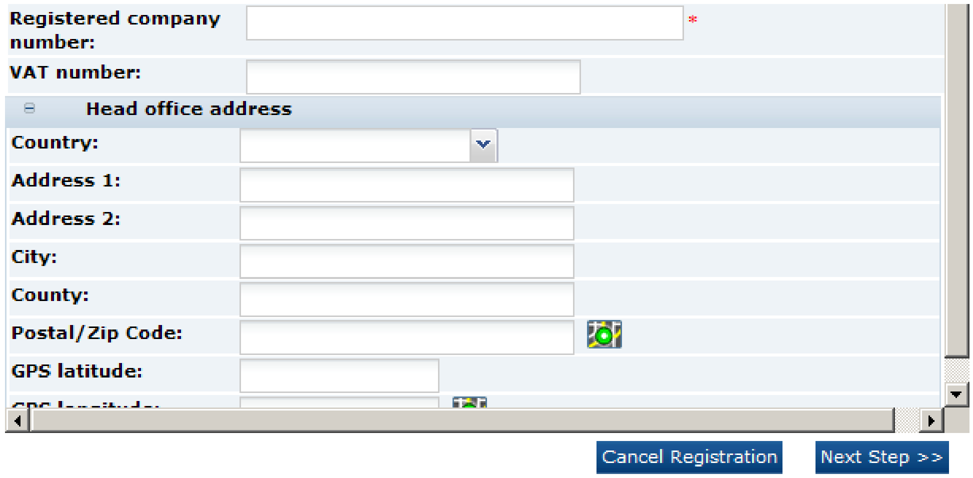
2. Enter the unique supplier code and select **Next Step**.

   If the entered supplier code is not valid, the Validation Errors dialog box appears. Select **Cancel** and reenter the supplier code.

> **Note:**
>
> The supplier code is communicated to the initial supplier user outside of the system, usually through a phone call or letter. This acts as a security measure. If the auto-generated e-mail is intercepted, access cannot be gained without the supplier code.

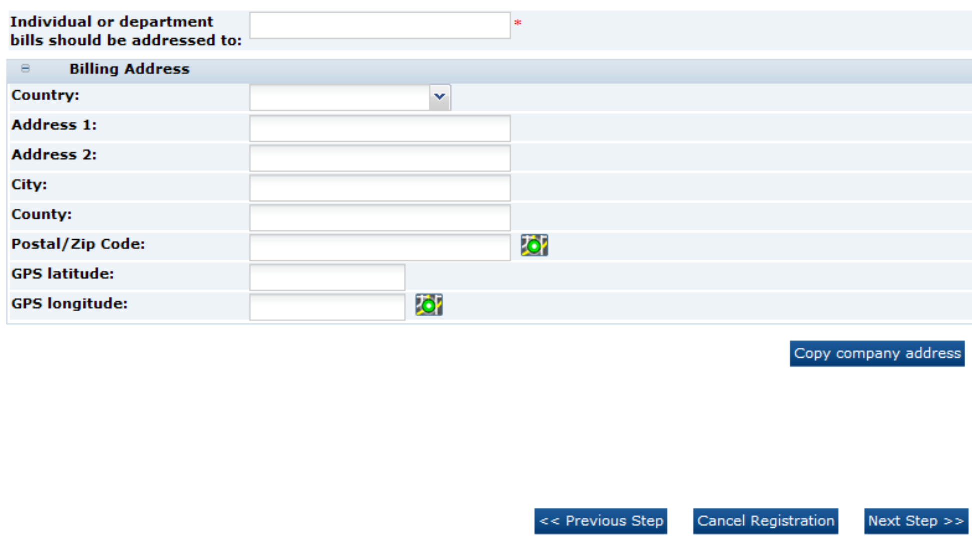
3. Enter the company details. The registered company name is mandatory. Select **Next Step**.

Figure 2-8 Company Details



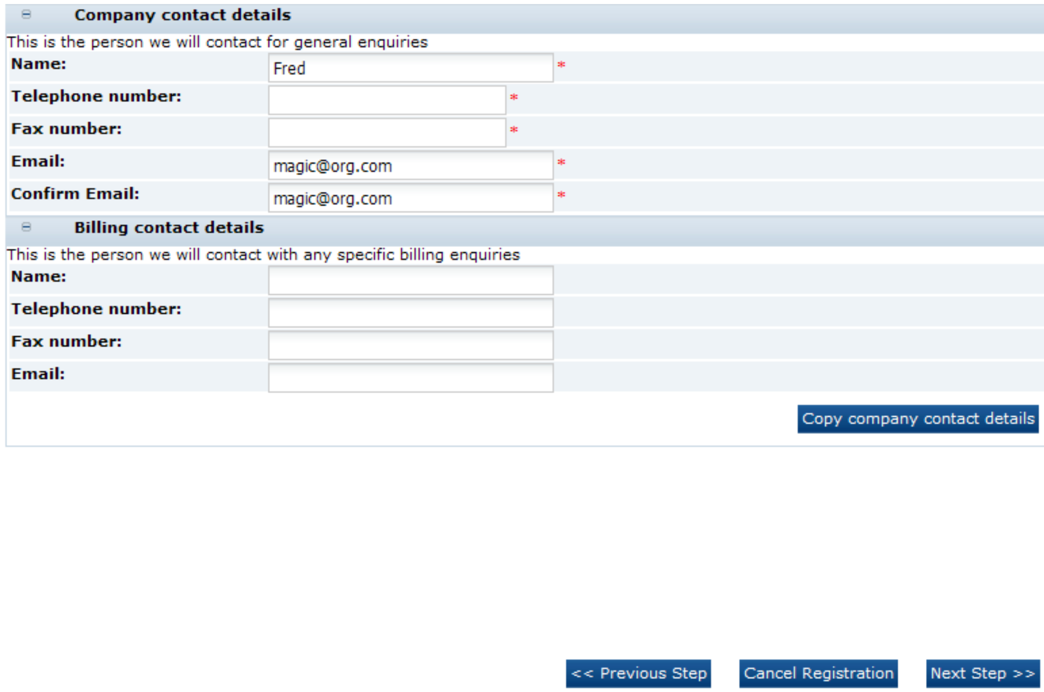
4. Enter the billing details. To copy the corporate address for the company as the billing address, select **Copy company address**. Select **Next Step**.

Figure 2-9 Billing Details



5. Enter the contact details. The company contact details are mandatory. To use the same company contact details as the billing contact details, select **Copy company contact details**. Select **Next Step**.

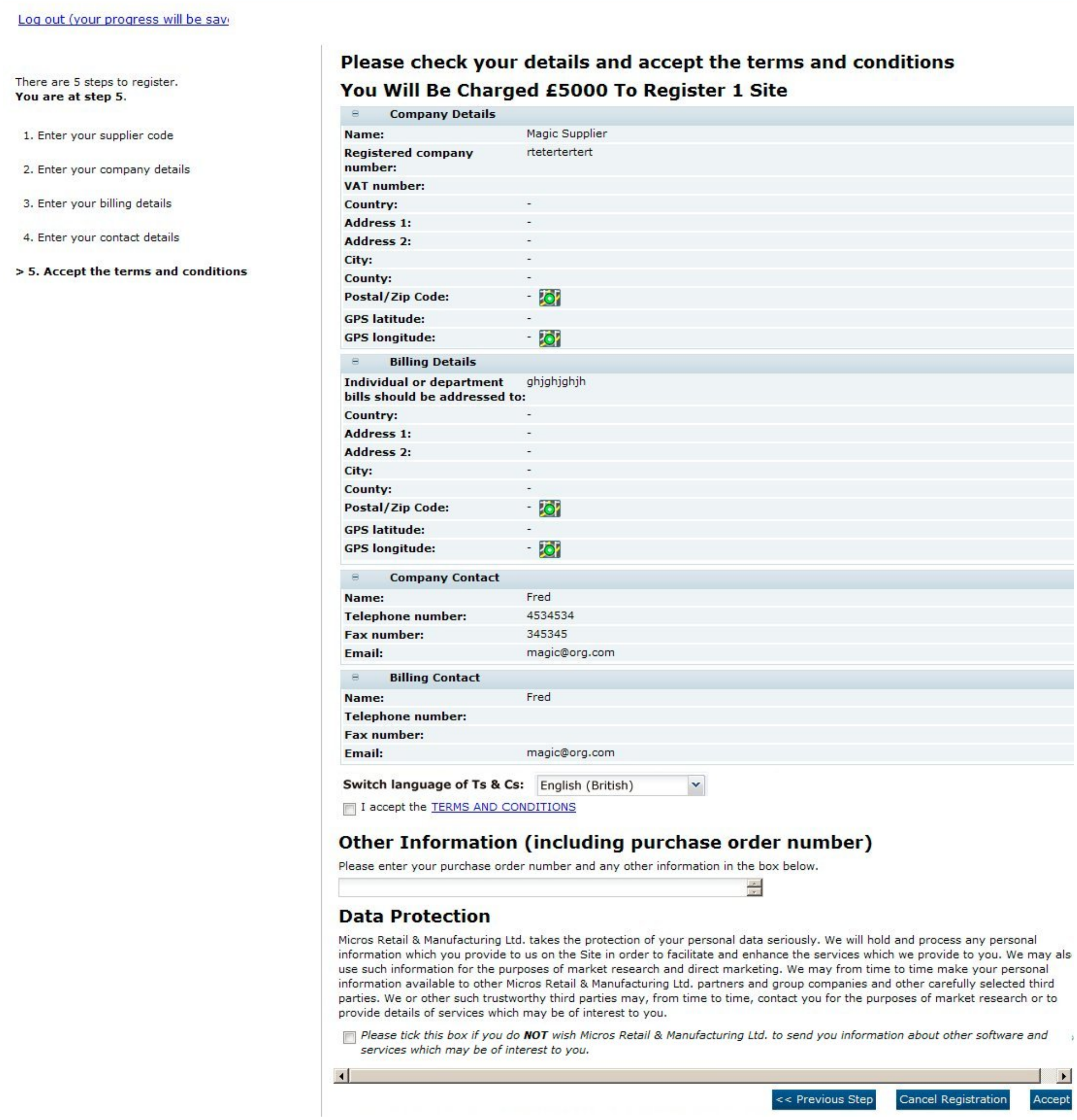
Figure 2-10 Company Contact Details



6. Accept the terms and conditions:
   a. If required to accept the terms and conditions, check the box. You may choose to view the terms and conditions in any of the supported languages.
   b. Under Other Information, enter the purchase order number.
   c. Under Data Protection, check to box if you do not wish to receive information on software and services.
   d. Select **Accept**.

      To log out without completing the process, select the log out link at the top of the window. The details on the previous windows are validated and saved. The user is logged out.

Figure 2-11 Accept Terms and Conditions



Once **Accept** is selected, the acceptance process completes:

- The site status is set to Awaiting Approval.

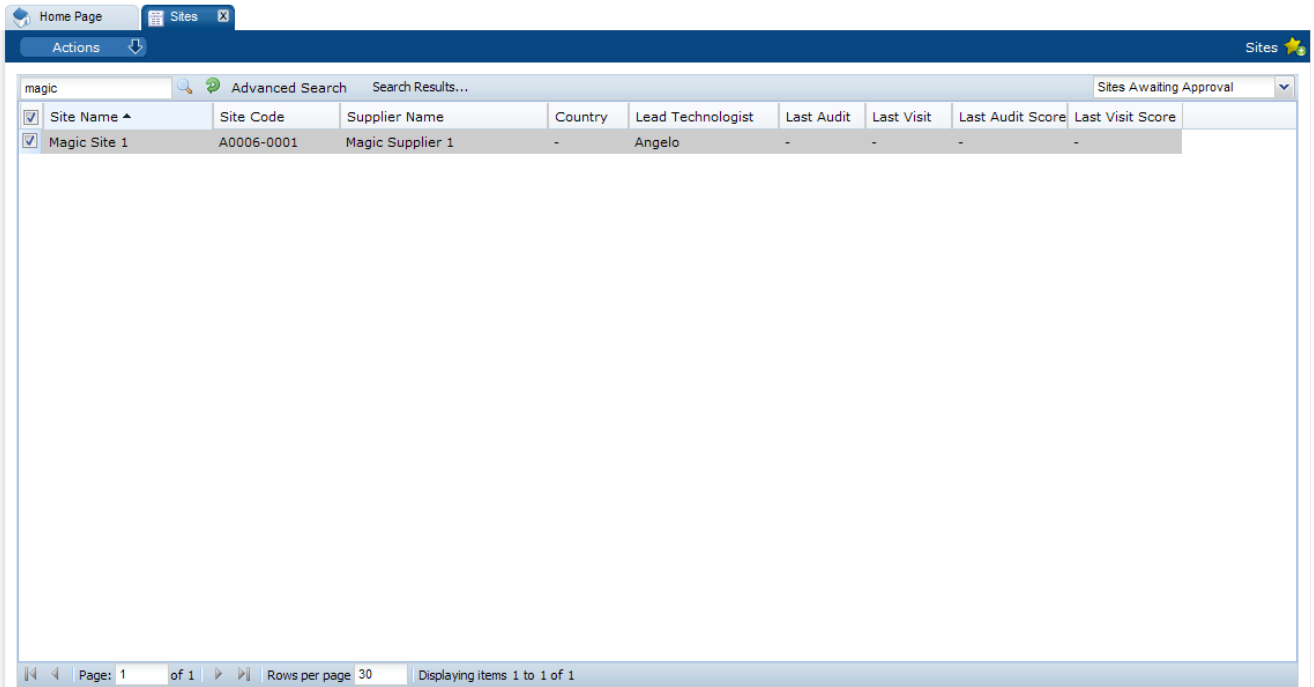
Approving the Registration

Once registered, a site must be approved by the Technologist before the account is fully functional.

When the supplier completes the registration process, the Technologist responsible for the site is notified that the approval is needed. Notification may be made using email or with a task in the Technologist's Task App. For information on Task App, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*.

In the email message or task, a link is provided to the Sites Awaiting Approval view. This view lists all sites with the Awaiting Approval status.

Figure 2-12 Sites Awaiting Approval



From this view, the Technologist can approve sites individually or approve a number with a single action. To approve a number of sites, select each sites and then select the Set To Active action. If the status change fails for one or more of the selected sites, an error dialog box appears.

There may be cases where the retailer believes that the supplier has not met the necessary standards and elects to reject the supplier. This is done by setting the status of the sites to Unapproved. This can be done by opening the record in Edit mode and selecting the Set to Unapproved action.

Completing the Approval of the Site

When one site or multiple sites are set to Active, the Site Status Change dialog box appears.

Figure 2-13 Site Status Change

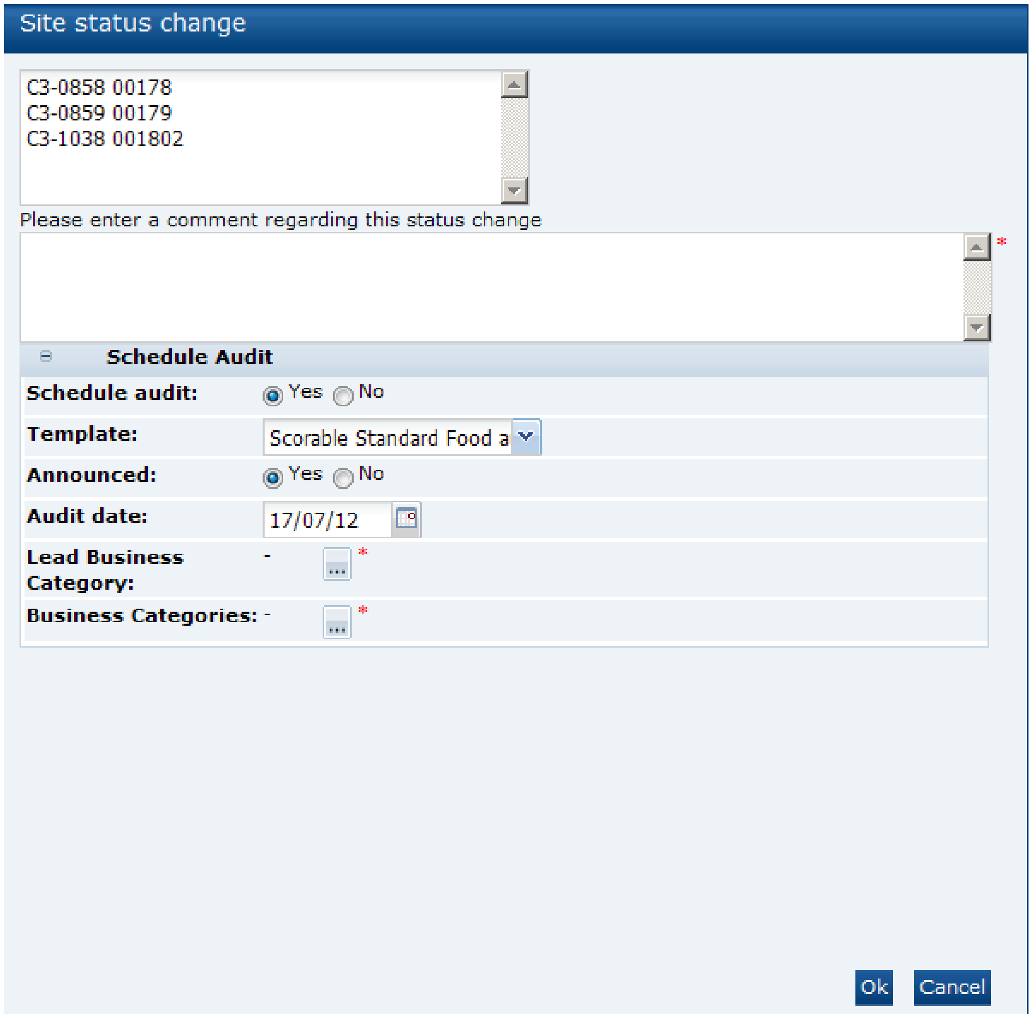


Table 2-3 describes the fields in the Site Status Change dialog box.

Table 2-3 Site Status Change Fields

Field	Description
Sites	When multiple sites are selected, the supplier and site codes are listed in ascending order by the site code.
Comment	Enter a comment describing the status change. Mandatory field.
Schedule Audit	Used to select whether the initial audit is to be scheduled for each of the sites being approved.
Template	Select the type of audit from the drop-down list.
Announced	Select whether the audit is announced. The default is set based on the selected type of audit in the Template field. If Optional or no value was selected for Template, the user must select Yes or No.

Table 2-3 (Cont.) Site Status Change Fields

Field	Description
Audit Date	Due date of the audit calculated based on the default of the selected audit template.
Lead Business Category	If the audit type requires a business category, Lead Business Category must be selected. Mandatory field.
Business Categories	If the audit type requires a business category, Business Categories must be selected. Mandatory field.

After making all the selections, select **Ok**:

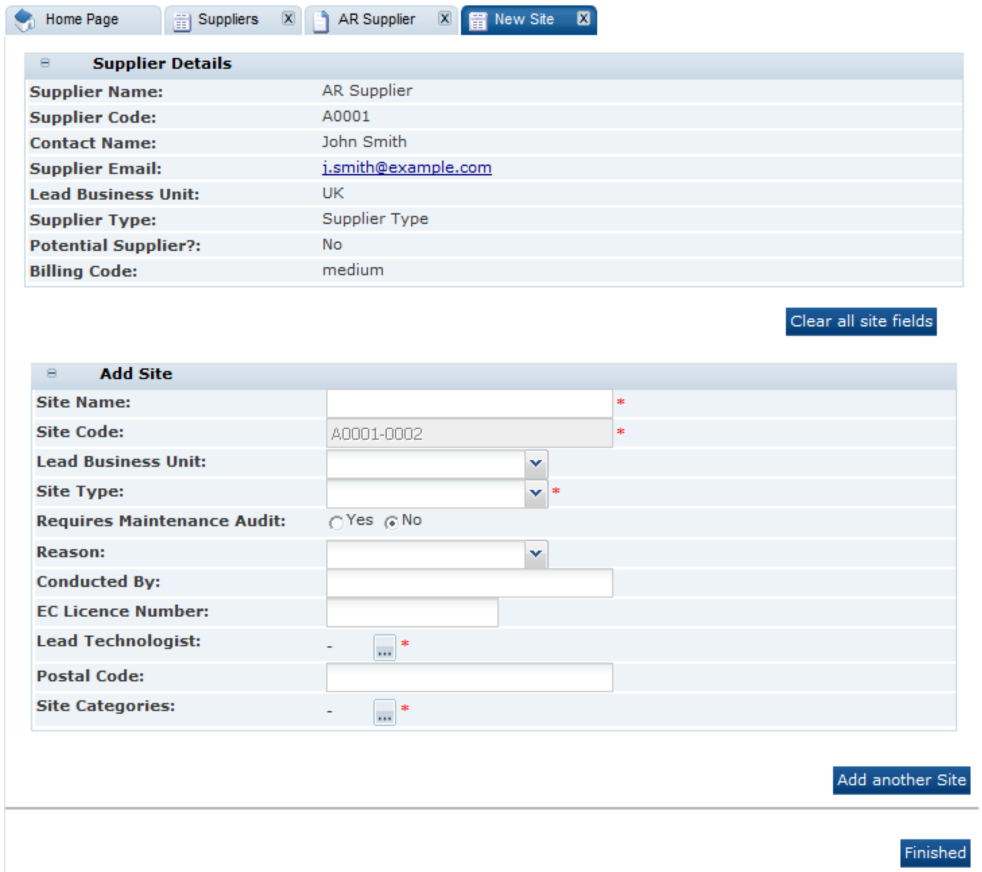
- The selected sites are set to Active.
- The entered comments are appended to the site's comments field.
- The Change History log is updated.
- If the option to schedule an audit was selected, an audit is created for the selected type against the site with the announced/unannounced flag and due date set as appropriate. The Lead Technologist and Business Category are carried through to the Audit record.
- When the first site of a potential supplier is approved, the Order record is updated to set the status to Unprocessed. For potential suppliers, this is done as part of the approval process rather than when the supplier completes the registration process.

Adding Additional Sites

When additional sites are required for a supplier, a Retailer user can add the additional sites. To add an additional site:

1. Select the Suppliers option from the Supplier drop-down list. The Suppliers tab opens.
2. Double-click the supplier name. A tab opens for that suppliers
3. Select the Sites subtab. The Sites page opens. This page lists the sites defined for the supplier.
4. Select the New Site action. The New Site tab opens.

Figure 2-14 New Site Page



The Supplier Details section is filled in with the details of the selected supplier. These fields are read only.

5. In the Add Site section, enter the details for the new site. The Site Code is generated by the system and cannot be changed. For information on these fields, see Table 2-2.
6. To add another site, click **Add another Site**. Another Add Site section is added to the page.
7. When you have finished entering the new sites, click **Finished**. The new site records are assigned to the Awaiting Registration status. For information on registering the new sites, see Registration.

> **Note:**
>
> Additional sites do not need to go through the full registration process. The additional sites just need to be approved.

Deleting Suppliers and Sites

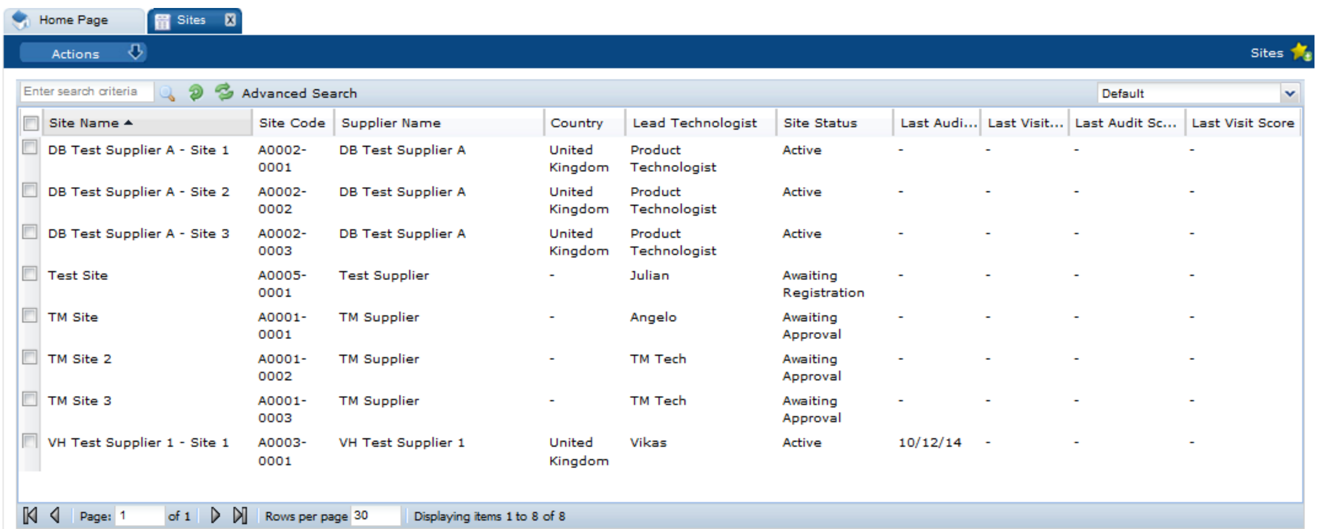
If a supplier/site account has been created in error or was created and never used, administrator users with the Power Administrator authority profile may delete the supplier and site accounts, but only where there are no associated records such as Products, Specifications, Audits, and so on. For more information, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

3

Site Management

To work with sites, select the Sites option from the Supplier drop-down list. The Sites tab opens. This page shows the list of available sites.

Figure 3-1 Sites Page



Site Name	Site Code	Supplier Name	Country	Lead Technologist	Site Status	Last Audi...	Last Visit...	Last Audit Sc...	Last Visit Score
DB Test Supplier A - Site 1	A0002-0001	DB Test Supplier A	United Kingdom	Product Technologist	Active	-	-	-	-
DB Test Supplier A - Site 2	A0002-0002	DB Test Supplier A	United Kingdom	Product Technologist	Active	-	-	-	-
DB Test Supplier A - Site 3	A0002-0003	DB Test Supplier A	United Kingdom	Product Technologist	Active	-	-	-	-
Test Site	A0005-0001	Test Supplier	-	Julian	Awaiting Registration	-	-	-	-
TM Site	A0001-0001	TM Supplier	-	Angelo	Awaiting Approval	-	-	-	-
TM Site 2	A0001-0002	TM Supplier	-	TM Tech	Awaiting Approval	-	-	-	-
TM Site 3	A0001-0003	TM Supplier	-	TM Tech	Awaiting Approval	-	-	-	-
VH Test Supplier 1 - Site 1	A0003-0001	VH Test Supplier 1	United Kingdom	Vikas	Active	10/12/14	-	-	-

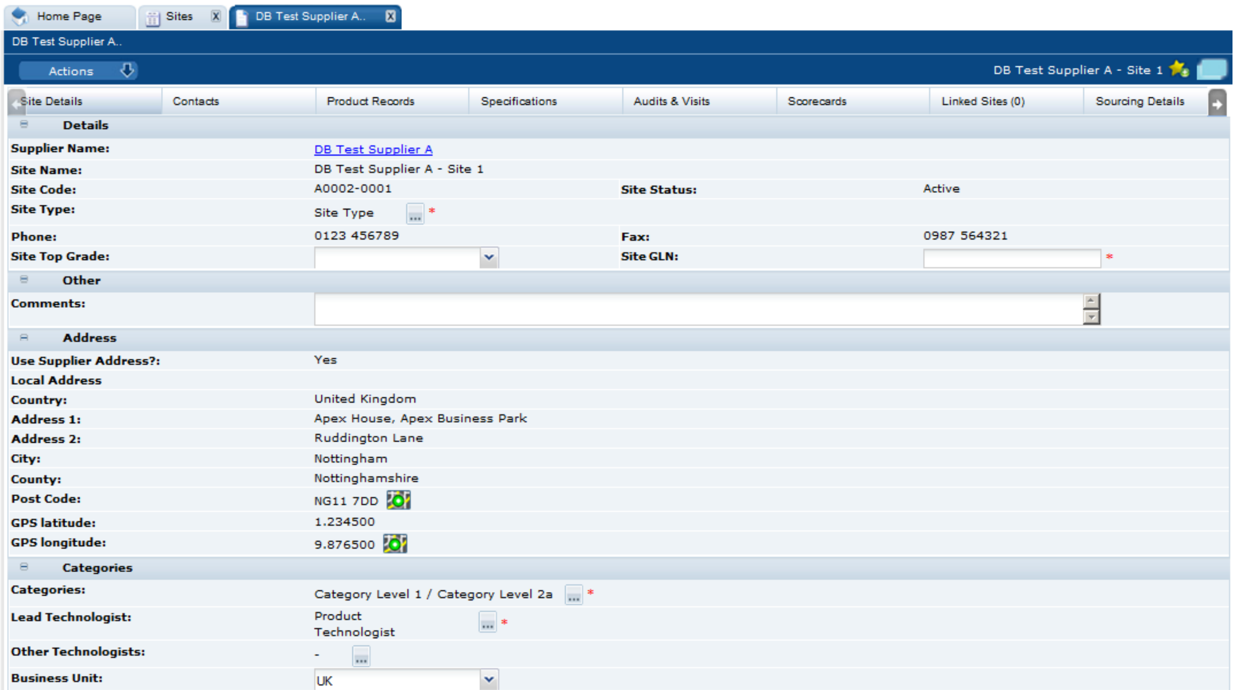
The following actions are available:

- New Alert: For information on creating a new alert, see Alerts Management.
- Change Status: Select one or more sites from the list and select the Change Status action. Select the new status for the sites from the list. Only Retailer users can change the status.

  If delisting a site, a check is made for any associated active Product Specifications or Product Records. If any are found, they are listed, with the option to continue or exit. Consider deactivating or archiving any listed before delisting the site.

To see the details for a specific site, double-click the row. A tab opens with the details. You can also select the View or Edit actions.

Figure 3-2 Site Details Page



The following subtabs are available. Select a subtab to see the information for the site:

- Site Details

> **Note:**
>
> Site GLN may be configured to be mandatory, to be of a specific format (such as 13 digits), and to include check digit validation.

- Contacts: List of contacts for the site.
- Product Records: If Product is purchased and implemented, list of product records.
- Specifications: List of product specification documents and the status.
- Audits & Visits: List of audits and visits and the status.
- Scorecards: List of scorecards and status.
- Linked Sites: The number of linked sites is shown in parentheses on the subtab.
- Sourcing Details: Billing and production details.
- References: List of certificates and the status.
- Project Links: If Project is purchased and implemented, list of projects and status.
- Custom Fields
- Change History
- Attachments: List of documents attached to the site.

The following actions are available:

- New Audit: For information on creating a new audit, see Audits & Visits.
- New Visit: For information on creating a new visit, see Audits & Visits.
- New Scorecard: For information on creating a new scorecard, see Scorecard Management.

4 Contacts Management

This chapter covers managing contacts:

- Contacts are usually created by a Supplier user, however Retailer users can be granted the Supplier Contacts Administrator authority profile to allow them to create contacts.
- Contacts are created by the Supplier users that have the Supplier Administrator or Site Administrator roles/authority profiles.
- Supplier users access contacts through the Contacts tab on their Company /Company Details record and their Site records. They only have visibility to the contacts in their organization and only the sites with which they are associated.
- Retailer users access contacts through the Supplier/Contacts list view or Contacts tab in the individual supplier and site records. They have visibility to all contacts for all suppliers and sites.
- Contacts can be assigned to the supplier and/or the site by creating a single contact record and assigning the relevant roles. Site contacts can be assigned to all or just specific sites, however when they are created as a user, they may have been associated to specific sites, in which case they would only be able to be a contact for those sites.
- A contact may or may not be a user of the system. This allows, for example, a contact of a CEO to be created for reference purposes without the need to set them up as a user of the system.
- When a contact is created, the pick-list allows an existing user of the system or the name of a non-user to be selected.
- The set of contact roles is configurable. Each portal can build their own set of roles that contacts are to be recorded for at the supplier and site levels:
  - The roles may be set as mandatory, in which case, a contact must be assigned to that role for the supplier/site account to be approved.
  - Some roles are mandatory because they are used by the system to automatically notify the relevant users as part of the system's workflow. For example, a Specification Main Contact would be notified when a product specification requires action.
  - Where there are mandatory roles that have not been assigned a contact, the supplier/site administrator is alerted through the Urgent Item Manager (UIM) app.

This chapter covers the following topics:

Creating a Contact

A contact can be created starting either from the supplier or site record. To create a new contact:

1. Select the New Contact action. The Contact Details page appears.

Figure 4-1 Contact Details Page for Creating a New Contact

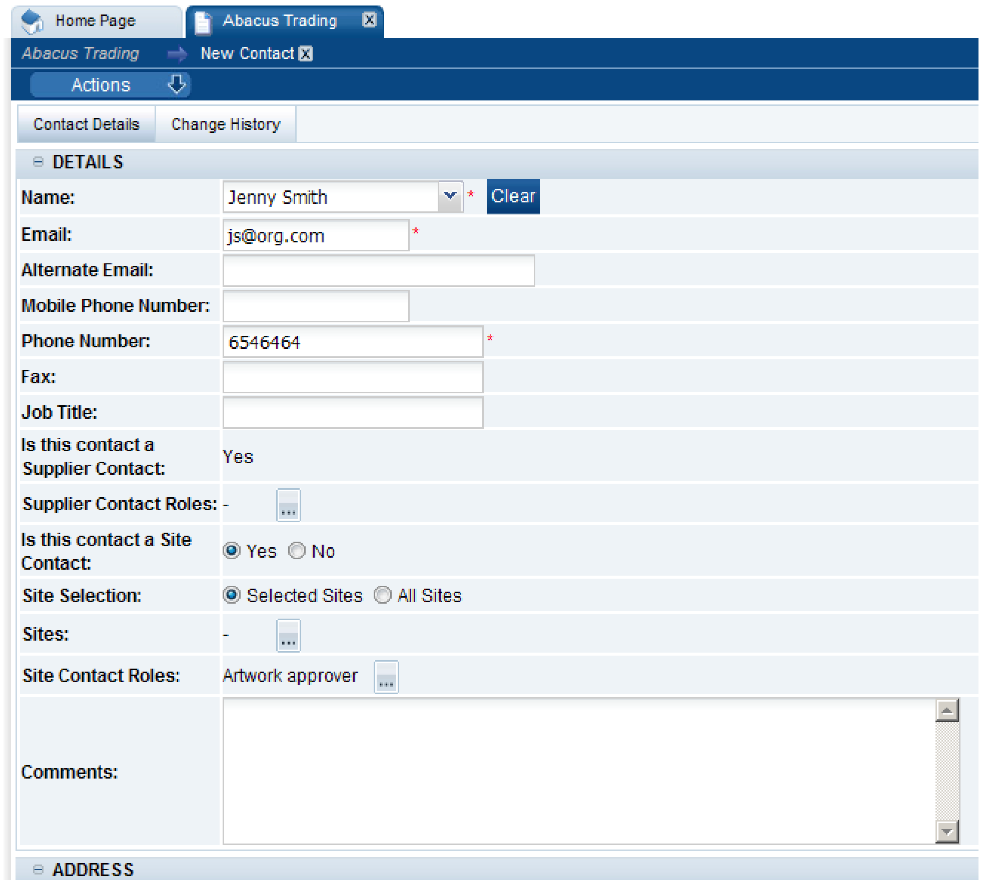


Table 4-1 describes the fields in this page.

Table 4-1 Contact Details Fields for Adding a New Contact

Field	Description
Name	Enter a name or select a name from the drop-down list. Mandatory field.
Email	Enter the email address for this contact. Mandatory field.
Alternate Email	Enter an alternate email address, if available.
Mobile Phone Number	Enter a mobile phone number, if available.
Phone Number	Enter the phone number for this contact. Mandatory field.
Fax	Enter a fax number, if available.
Job Title	Enter a job title, if available.

Table 4-1 (Cont.) Contact Details Fields for Adding a New Contact

Field	Description
Is this contact a Supplier Contact	• When creating a contact from the Supplier record, this field is set to Yes. • When creating a contact from the Site record, this field is set to No.
Supplier Contact Roles	Select the supplier-level roles for this contact from the list of available roles. This field is only available when creating a contact from the Supplier record. Mandatory field.
Is this contact a Site Contact	• When creating a contact from the Supplier record, this field is set to No. • When creating a contact from the Site record, this field is set to Yes.
Site Selection	• When set to Selected Sites, the sites must be chosen in the Selected Sites field. • When set to All Sites, this contact is used for all sites for this supplier, including any sites added later.
Selected Sites	Select the sites to be assigned to the contact. This field is only displayed when Site Selection field is set to Selected Sites. Mandatory field.
Site Contact Roles	Select the site-level roles for this contact from the list of available roles. This field is only available when creating a contact from the Site record. Mandatory field.
Comments	Enter any comments.
Address	If a name is selected from the list of users, the address is automatically filled in: • When creating a contact from the Supplier record, this field is set to the supplier address. • When creating a contact from the Site record, this field is set to the site address.

2. Enter the information for this contact. When all the information is entered, select the Save action. The new contact is created.

Editing a Contact

Supplier users can edit supplier contacts and site contacts. Site users can only edit site contacts.

Editing a Supplier Contact

To edit a supplier contact:

1. Navigate to the contact record. Select Company, Company Details, and then Contacts. The Contacts page appears.

Figure 4-2 Supplier Contacts Page

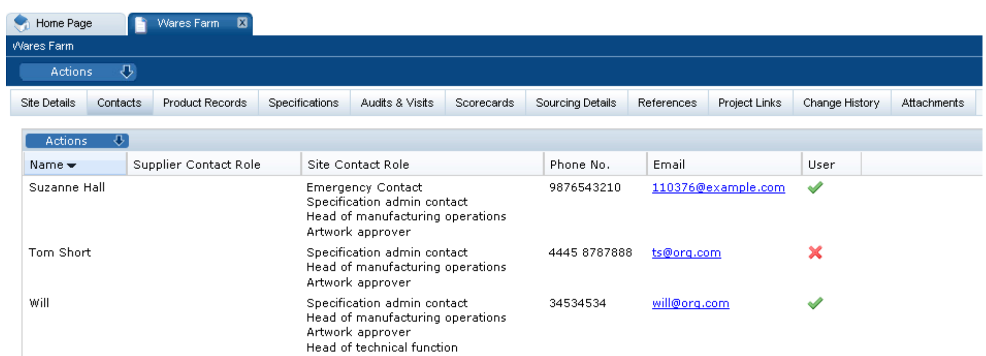
2. Select the relevant contact.
3. Select the Edit action. The Contact Details appear.
4. Make any needed updates and select the Save action.

Editing a Site Contact

To edit a site contact:

1. Navigate to the contact record. Select Company, Company Details, and then Sites.The Sites page appears.
2. Select Contacts. The Contacts page appears.

Figure 4-3 Site Contacts Page



3. Select the relevant contact.
4. Select the Edit action. The Contact Details appear.
5. Make any needed updates and select the Save action.

Deleting a Contact

Supplier users can delete supplier contacts and site contacts. Site users can only delete site contacts.

Deleting a Supplier Contact

To delete a supplier contact:

1. Navigate to the contact record. Select Company, Company Details, and then Contacts. The Contacts page appears. See Figure 4-2.

2. Select the relevant contact.
3. Select the Edit action. The Contact Details appear.
4. Select the Delete action. The Delete Contact dialog box appears. To confirm the deletion, select **Ok**.

> **Note:**
>
> This could result in sites losing a mandatory contact as this contact may be a supplier-level contact that has been set as a contact covering one or more sites. Site users logging in see an action in the Urgent Items Manager stating that a mandatory contact is missing. For more information on the Urgent Items Manager, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*.

Deleting a Site Contact

To delete a site contact:

1. Navigate to the contact record. Select Company, Company Details, and then Sites.The Sites page appears.
2. Select Contacts. The Contacts page appears. See Figure 4-3.
3. Select the relevant contact.
4. Select the Edit action. The Contact Details appear.
5. Select the Delete action. The Delete Contact dialog box appears. To confirm the deletion, select **Ok**.

5 Alerts Management

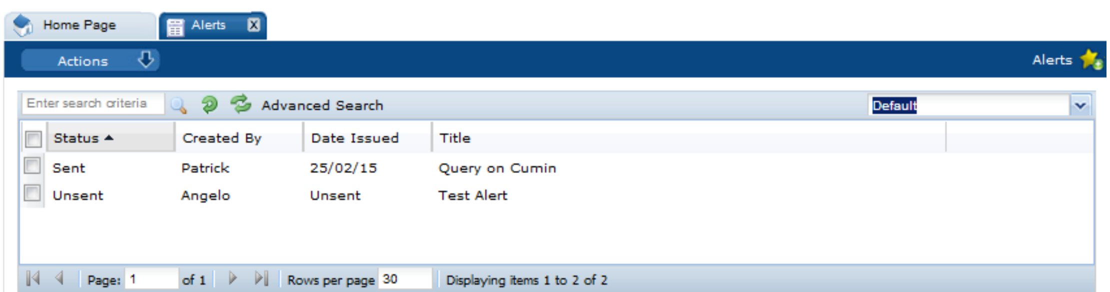
Alerts are a means of communication between the retailer and its supplier base for the management of urgent issues, such as food scares, and capture of feedback using a customized form, for example, whether the supplier uses a particular ingredient or process in the manufacture of its products. Alerts can be created from the list of Alerts or from the lists of Suppliers or Sites. Alerts are distributed using email and can be targeted at specific sets of suppliers and their manufacturing sites.

This chapter covers managing and responding to alerts.

Managing Alerts

To manage alerts, select the Alerts action. The Alerts tab opens.

Figure 5-1 Alerts Page



For each alert, the following information appears:

- Status of the alert.
- Name of the user who created the alert.
- Date the alert was issued or Unsent.
- Title of the alert.

Create a New Alert

An alert can be created starting either from the Suppliers or Sites tab. To create an alert, select the New Alert action. The New Alert tab opens.

Figure 5-2 New Alert Page

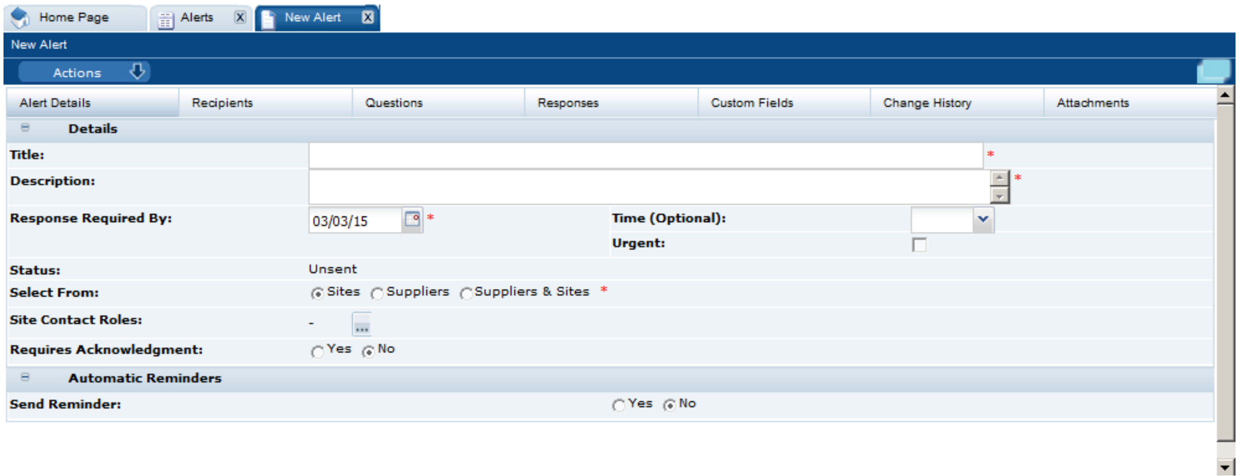


Table 5-1 describes the fields on this page.

Table 5-1 New Alert Tab

Field	Description
Title	Title displayed for the alert. Mandatory field.
Description	Description of the alert. Mandatory field.
Response Required By	Date by which responses must be returned. Mandatory field.
Time (Optional)	Time by which responses must be returned on the due date. Optional field.
Urgent	Check this box if the alert should be marked as urgent in email and response views.
Status	Status of the alert, for example, Sent or Unsent.
Select From	Select to target suppliers, sites, or both for this alert. Mandatory field.
Site Contact Roles	List of site contact roles that can respond to this alert. Field not shown if suppliers is selected in the Select From field.
Requires Acknowledgement	Check this box if an acknowledgement is required from the supplier.
Send Reminder	If Yes is selected, the Frequency and Send Reminders Until fields appear. Select how often to send a reminder and an ending date for reminders. An end date is required.

The following subtabs are available:

- Alert Details
- Recipients: List of users who receive notification when the alert is created.
- Questions: Set of questions that need to be responded to.
- Responses: List of responses to this alert.
- Custom Fields

- Change History
- Attachments: List of documents attached to the alert.

The following actions are available:

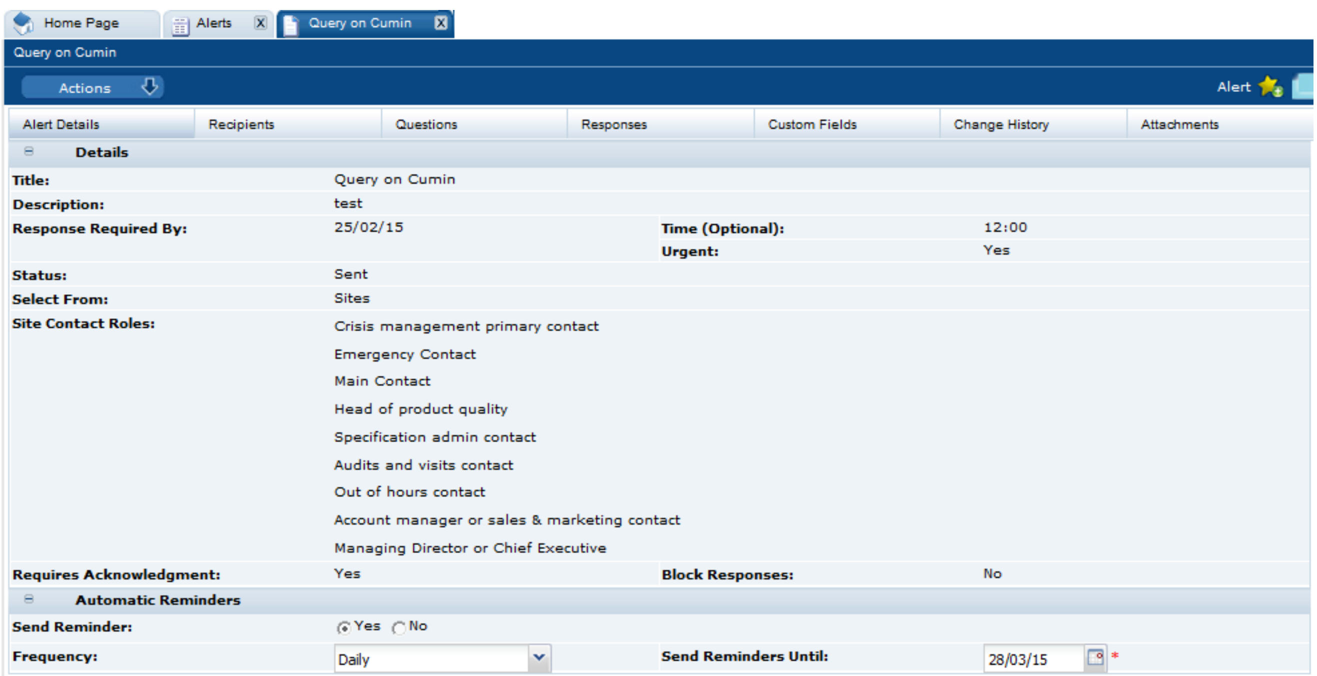
- Create Mailing List
- Load Mailing List
- Import Recipients
- Save and Send

For information on mailing lists, see the *Oracle Retail Brand Compliance Management Cloud Service Management Administration Guide*.

View or Edit an Existing Alert

Select an alert on the Alerts page. Select the View or Edit action. A tab opens for the selected alert.

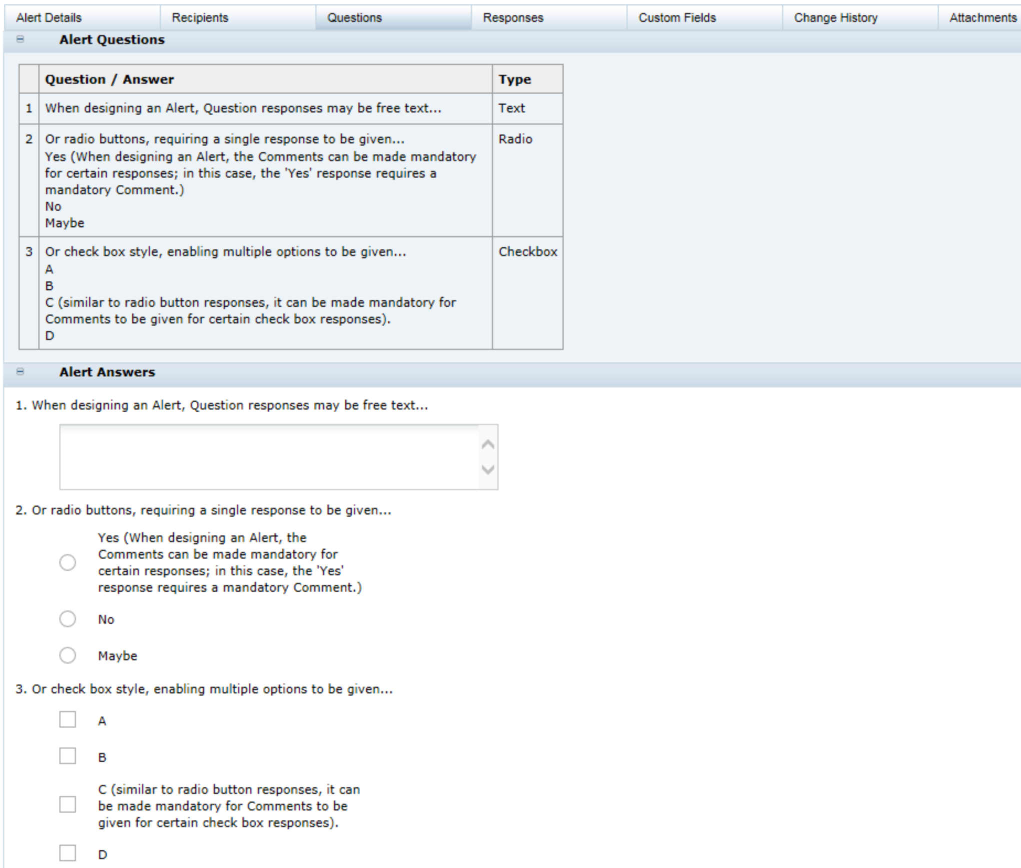
Figure 5-3 Alert Details Page



For information on these fields and subtabs, see Create a New Alert.

To see the question details, select the Questions subtab. The retailer user sees the table of the question details (the Alert Questions field-set) and a preview of how they will be presented to the supplier user (the Alert Answers field-set).

Figure 5-4 Alert Questions Page



Responding to Alerts

To manage the responses to alerts, select the Alert Responses action. The Alert Responses tab opens.

Figure 5-5 Alert Responses Page

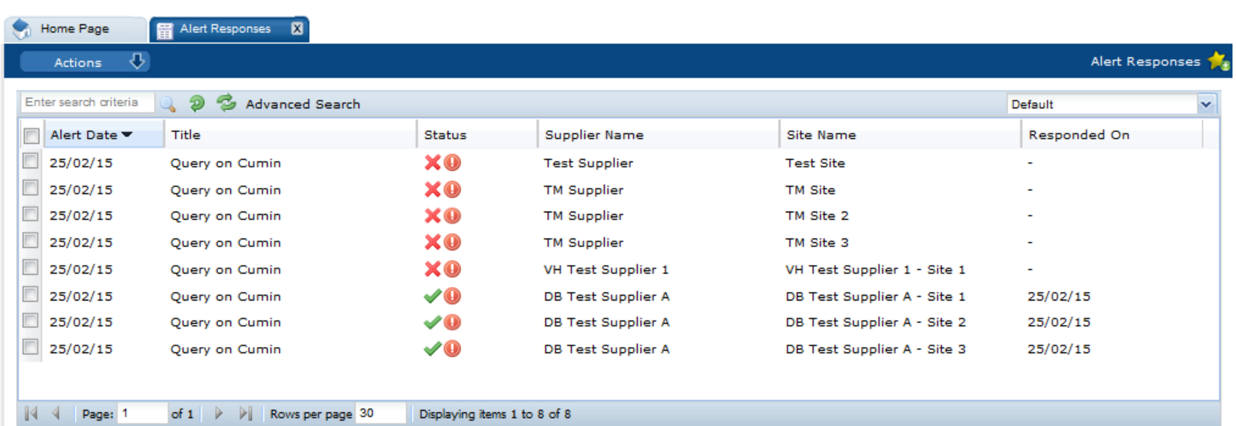


Table 5-2 describes the columns in this page.

Table 5-2 Alert Responses

Field	Description
Alert Date	Date the alert was created.
Title	Title of the alert.
Status	Status of the alert:
	Response is needed.
	Response received.
	Urgent alert item.
	No response needed.
Supplier Name	Name of the supplier that issued the response.
Site Name	Name of the site that issued the response.
Responded On	Date when a response was submitted.

To see the details on a specific alert response, double-click the row. A tab opens with the details of the response.

Figure 5-6 Alert Response Details Page

6
Audits & Visits

Audits and visits are created against suppliers' sites and are managed between the retailer and supplier users. Issues of non-conformance may be created to manage any necessary follow-up corrective actions. Once created, a predefined workflow process is used to manage the audit/visit and any non-conformances through their lifecycle, ensuring the appropriate users are notified and given access to the relevant data in order to complete their role in the process.

Audits and Visits are created from templates. For information on the templates, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

Audits and visits are created from within the Site record. A system parameter can be set to also allow them to be created from the list of sites.

To work with audits and visits, select the Audits & Visits option from the Supplier drop-down list. The Audits & Visits tab opens.

Figure 6-1 Audit & Visits Page

The following columns are shown:

- Site Name
- Site Code
- Template
- Status
- Due Date
- Booked Date
- From Date
- To Date
- Lead Technologist
- Score/Grade

To edit an entry, select the row and then the Edit action. A tab opens in edit mode. For information on the fields shown for this tab, see Table 6-1.

To view details on an audit, double-click a row. A tab opens with the details.

Figure 6-2 Audit Details Page

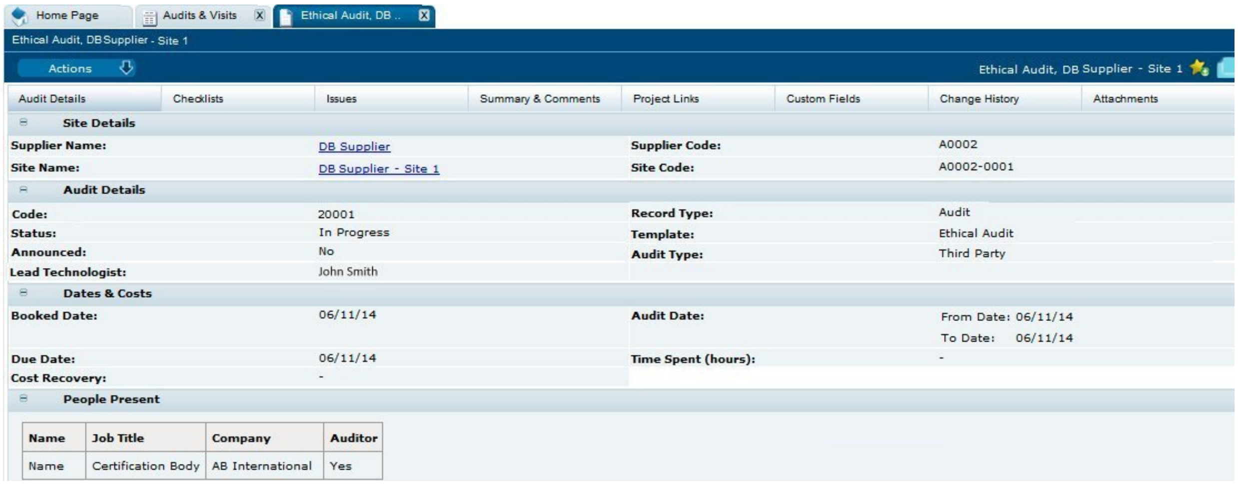


Table 6-1 describes the fields in this view.

Table 6-1 Audit Details

Field	Description
Site Details	
Supplier Name	Name of the supplier.
Supplier Code	Code assigned to the supplier.
Site Name	Name of the site.
Site Code	Code assigned to the site.
Audit Details	
Code	Unique identifier of the audit/visit.
Record Type	Type of audit/visit.
Template	Template used to create the audit.
Status	Status of the audit.
Audit Type	Indicates whether this is an internal or third-party audit.
Announced	Indicates whether the supplier knows that the audit/visit is scheduled.
Lead Technologist	Retailer person responsible for the audit/visit.
Dates & Costs	
Booked Date	Date the audit/visit is expected to take place. This is optional.
Due Date	Date the audit/visit is due to be completed
Audit Date	From and to dates when the audit took place.

Table 6-1 (Cont.) Audit Details

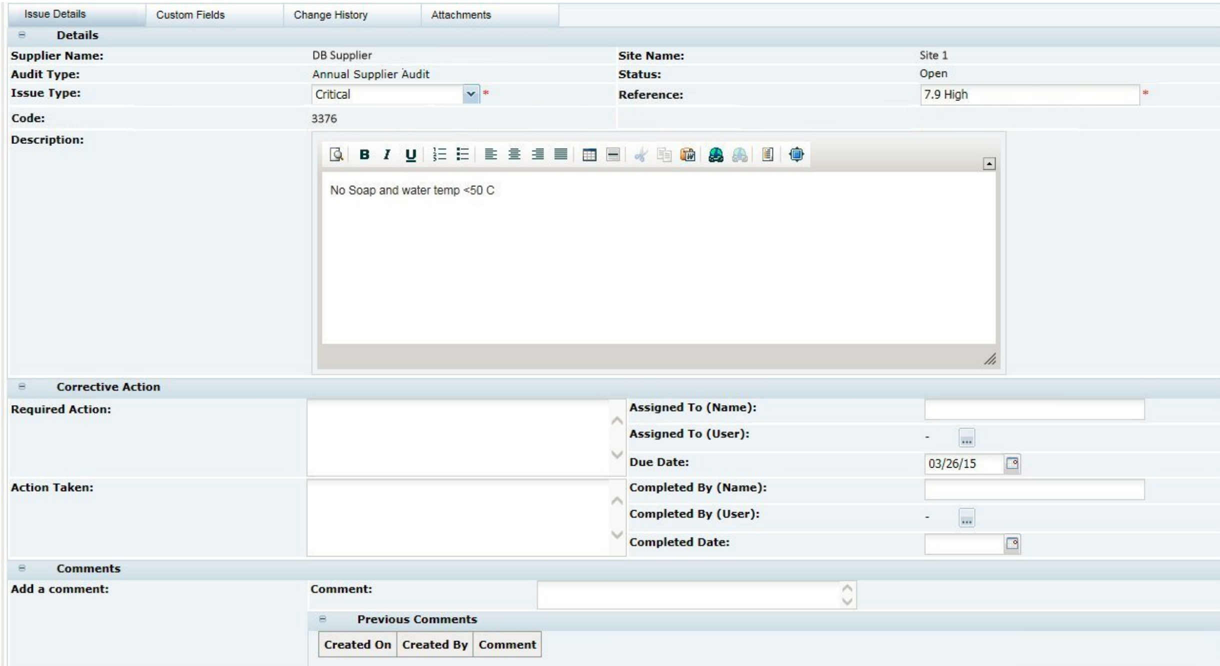
Field	Description
Time Spent (hours)	Time the retailer spent working on the audit/visit.
Cost Recovery	Indicates whether the cost (all or part) of the audit/visit is recharged to the supplier. If Yes is selected, the Cost Recover Comments field appears. The amount to be recharged can be entered here.
People Present	For each person present at the audit, the following information is listed: • Name of the person • Job title • Company name • Indicator if this person is an auditor

The following subtabs are available:

- Audit Details
- Checklists
- Issues: List of any issues found during the audit/visit.
- Summary & Comments: Information recorded during the audit/visit.
- Project Links: If Project is purchased and implemented, list of projects and status.
- Custom Fields
- Change History
- Attachments: Documents attached to this audit/visit.

To see the list of issues from the audit/visit, select the Issues subtab.

Figure 6-3 Audit/Visit Issues Page



The following subtabs are available. Select a subtab to see the information for the issue:

- Issue Details
- Custom Fields
- Change History
- Attachments: List of documents attached to the issue.

Audit Updates Wizard

Auditors can be assigned or deleted from multiple internal Audit records, using the Update Auditors option, from the Audits and Visits Action menu.

Audits & Visits Workflow

Audit & Visit Statuses and What They Mean

All statuses are changed manually, except for the change from Scheduled to In Progress, which is set automatically once the Audit From and To Dates have been entered.

Table 6-2 Audit & Visit Statuses

Status	Meaning	Actions Available
SCHEDULED	Initial status when an Audit or Visit is created and the Audit/Visit has not yet taken place. Supplier users have visibility and access if *announced* OR if this type of Audit/Visit can be created by the supplier, otherwise it is only accessible to Retailer at this status. Additionally, if an *announced* Audit/Visit is created by the Retailer and the type is *Internal*, the Supplier user can only see the entry in the view, they cannot open the record at this status.	**Save** Once the Audit From and To Dates are entered, saving the Audit/Visit will update the status to In Progress. **Set to Not Progressed** **Delete** (Retailer only)
IN PROGRESS	Indicates that the Audit/Visit has now taken place. This status is set automatically once the Audit From and To Dates have been entered and the record has been saved. The Audit/Visit and any Issues are editable. Issues can be created. Supplier users only have visibility if the Audit/Visit is *announced*. Supplier users may only edit/add Issues if this type of Audit/Visit can be created by Suppliers.	**Set to Awaiting Corrective Action** **Set to Awaiting Sign-off** (Retailer only) **Set to Approved** (Retailer only) **Set to Failed** (Retailer only) **Set to Abandoned** (Retailer only) **Delete** (Retailer Audit Administrator only)
AWAITING CORRECTIVE ACTION	Indicates that Corrective Actions are required to be completed. The Audit/Visit is locked and no further Issues may be created. The Issue *Details* are locked to all users. The Issue *Corrective Actions* are editable to Supplier users (not to Retailer at this status).	**Set to Awaiting Sign off** (Supplier only) **Set to Abandoned** (Retailer only) **Delete** (Retailer Audit Administrator only)
AWAITING SIGN-OFF	Indicates that Corrective Actions have now been completed and must be reviewed by Retailer. The Audit/Visit is locked and no further Issues may be created. The Issues' *Details* and *Corrective Actions* are locked to all users. RETAILER may edit the Issue status and Comment fields.	**Set to Approved** (Retailer only) **Set to Awaiting Amendment** (Retailer only) **Set to In Progress** (Retailer only) **Set to Abandoned** (Retailer only) **Delete** (Retailer Audit Administrator only)
AWAITING AMENDMENT	Indicates that Corrective Actions have been reviewed by the Retailer, but further actions or information must be completed by the Supplier. The Audit/Visit is locked and no further Issues may be created.	**Set to Awaiting Sign off** (Supplier only) **Set to Abandoned** (Retailer only)

Table 6-2 (Cont.) Audit & Visit Statuses

Status	Meaning	Actions Available
	The Issue *Details* are locked to all users. The Issue *Corrective Actions* are editable to Supplier users (not to Retailer users at this status).	**Delete** (Retailer Audit Administrator only)
FAILED	Indicates that the Audit/Visit has been completed and, even after completion of any Corrective Actions (where present), the Audit/Visit is deemed to have failed. It is possible to set the Audit/Visit to Completed but to assign a Score of *Failed*, so it is likely that the Failed Audit/Visit status would only be used in the case of a severe failure. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer.	None
APPROVED	Indicates that any Corrective Actions have now been completed and approved and all activity for the Audit/Visit is now complete. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer. The next future audit record will be created if this type of Audit/Visit has auto-scheduling enabled.	None
NOT PROGRESSED	Used to indicate that the Audit/Visit may have been scheduled but circumstances mean that it did not go ahead. If the Audit/Visit was created erroneously, it may be deleted by an Audit Administrator, otherwise it may be left on the system as evidence that the Audit/Visit was never carried out. The Comments field can be used to record this. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer.	**Delete** (Retailer Audit Administrator only)
ABANDONED	Used to indicate that the Audit/Visit may have proceeded to some extent, but circumstances mean that it could not be completed. This may be due to practical circumstances or the fact that the initial assessment was so unsatisfactory as to warrant the abandonment of this Audit/Visit and an alternative to be scheduled for future. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer.	**Set to In Progress** (Retailer Audit Administrator only)

Issue Statuses and What They Mean

Table 6-3 Issue Statuses

Status	Meaning	Actions Available
OPEN	Initial status when an Issue is created. Both Supplier and Retailer can edit the Issue.	**Save** Once the Completed By, Completed Date, and Corrective Action fields are entered, saving the Issue will update the status to Awaiting Approval.
AWAITING APPROVAL	Supplier user can edit the Issue if the type of audit can be created by Suppliers, otherwise only the Retailer may edit.	**Accept** (Retailer only, unless Suppliers may create this type of Audit/Visit) **Reject** (Retailer only, unless Suppliers may create this type of Audit/Visit)
REJECTED	Supplier users can edit the Issue if the type of audit can be created by Suppliers, otherwise only the Retailer may edit.	**Accept** (Retailer only, unless Suppliers may create this type of Audit/Visit)
ACCEPTED	Supplier users can edit the Issue if the type of audit can be created by Suppliers, otherwise only the Retailer may edit.	**Reject** (Retailer only, unless Suppliers may create this type of Audit/Visit)
COMPLETED	Final state when the Audit/Visit has been set to Completed. Cannot be edited.	None

Audit & Visit Dates and What They Mean

Due Date

The Due Date represents the date by which the Audit/Visit must have been carried out, otherwise it could be deemed to be overdue.

For the types of Audit which achieve certification, it would represent the date on which the existing certificate would expire.

The Due Date must be entered in order to create and save a new Audit or Visit.

The Due Date may be entered as either a past or future date.

The Audit/Visit will appear in the Lead Technologist's Urgent Items list if the Due Date passes before the Audit/Visit is completed.

Booked Date

The Booked Date represents the date on which the Audit/Visit will be carried out. This does not need to be entered straightaway, but can be entered at any time to indicate that arrangements have been made by the relevant parties for the Audit or Visit to take place.

This is the date you will put in your calendar.

The Booked Date would normally be on or before the Due Date, though the system does not restrict this as practical circumstances may prevent this from being possible.

The Booked Date may be entered as either a past or future date.

Audit or Visit From/To Date

The Audit or Visit From / To Dates represent the actual dates when the Audit/Visit took place. Both the From and To Dates must be entered, to indicate whether the activity took place over a number of days, but both dates may be the same if all activity happened on a single day.

The From and To Dates may not be set in the future as they should only be entered once the Audit/Visit has actually been carried out.

Once the From and To Dates have been entered (and the record is saved), the status will automatically be updated to **In Progress**, which correctly represents the activity at this time.

Issue Dates and What They Mean

Due Date

The Due Date should be filled in to represent the date by which each corrective action is required to be completed. The Due Date will usually be arrived at in agreement between the Supplier and the Retailer Lead Technologist.

If any Issues have not been marked as completed by their Due Date, the Audit/Visit will appear in the Site's Audit & Visits Contacts' Urgent Items list and also the Urgent Items lists of any other Site users named as having the Issue assigned to them.

Completed Date

The Completed Date should be filled in by the Supplier to confirm that the corrective action has now been put in place and no further work is required.

The Completed Date may not be set in the future as they should only be entered once the corrective action has actually been carried out.

Once the Completed Date has been entered and the Issue record is saved, the status of the Issue will automatically be updated to **Completed.**

7 Scorecard Management

Scorecards provide a means for a retailer to assess their suppliers against a set of predefined criteria on an on-going or ad hoc basis. Scorecards are made up of a series of questions which may be answered by the suppler as a self-assessment or completed by the retailer.

Templates are available for creating scorecards. For information on the templates, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*. Scorecards can be created from within the Site record or from the list of Sites.

To work with scorecards, select the Scorecards option from the Supplier drop-down list. The Retailer Scorecards tab opens. The following information is displayed for each scorecard:

- Supplier Name
- Supplier Code
- Site Name
- Site Code
- Status
- Year
- Period
- Due Date
- Scorecard Type
- Person Responsible
- Completed
- Scorecard Score

To view a scorecard, double-click a row in the list. A tab opens with the scorecard details.

Figure 7-1 Scorecard Details Page

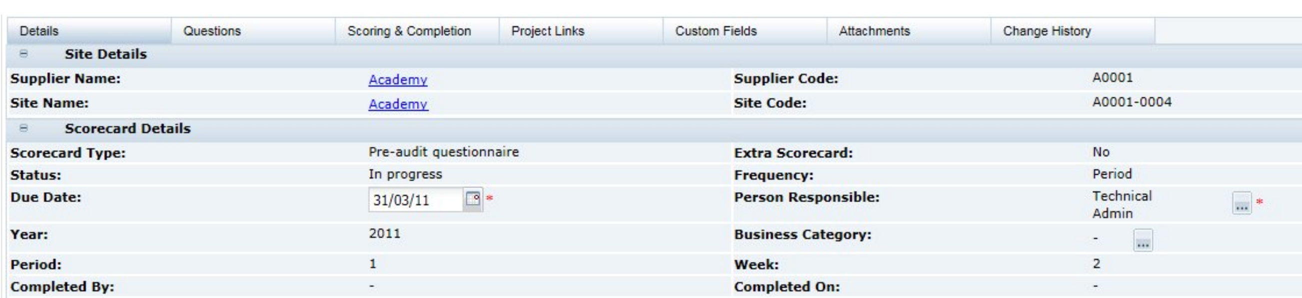


Table 7-1 describes the fields on this page:

Table 7-1 Scorecard Fields

Field	Description
Site Details	
Supplier Name	Name of the supplier.
Supplier Code	Code assigned to the supplier.
Site Name	Name of the site.
Site Code	Code assigned to the site.
Scorecard Details	
Scorecard Type	Name of the template used to create the scorecard.
Status	Status of the scorecard: • Future • In progress • Awaiting approval • Awaiting amendment • Complete
Due Date	Date the scorecard is due to be completed.
Year	Year that corresponds to the due date based on the system calendar.
Period	Period that corresponds to the due date based on the system calendar.
Week	Week that corresponds to the due date based on the system calendar.
Quarter Start Date	Quarter start date that corresponds to the due date based on the system calendar.
Quarter End Date	Quarter end date that corresponds to the due date based on the system calendar.
Extra Scorecard	Set if this scorecard was scheduled based on a frequency override.
Frequency	Frequency for scheduling this scorecard.
Person Responsible	Name of the technologist responsible for the scorecard.
Business Category	Business categories applicable to this scorecard.
Auto generation of this scorecard	If the Status field is Future, select whether to automatically reschedule this scorecard when it is completed or becomes due.
Submitted by	Name of the user who submitted or completed the scorecard.
Submitted on	Date the scorecard was submitted or completed.

The following subtabs are available:

- Details
- Questions
- Scoring & Completion
- Attachments
- Change History

Create a New Scorecard

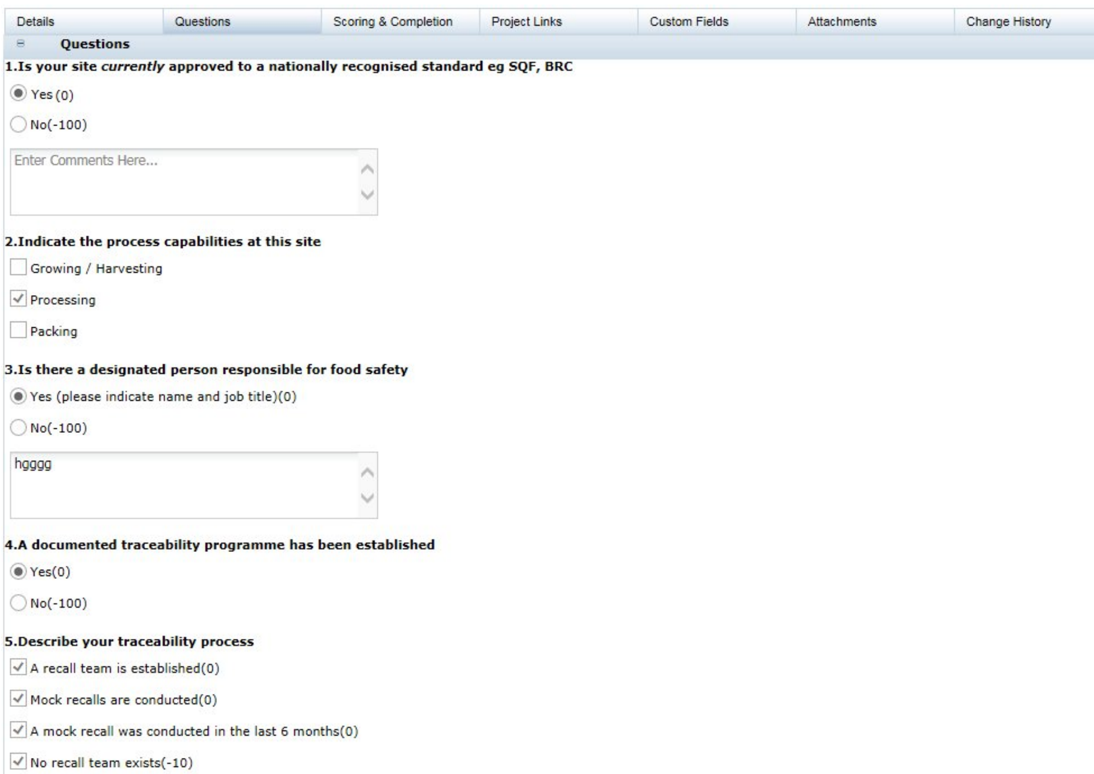
To create a new scorecard:

1. Select the New Scorecard action. The Create Scorecard dialog box appears.
2. From the drop-down lists, select a template, supplier, and site. Click **Ok**. The details of the new scorecard, based on the template, appear.
3. Update the fields for the scorecard for the audit/visit and save the scorecard.

Questions Subtab

To see the scorecard questions, select the Questions subtab. The questions are presented as configured in the scorecard's template for the supplier to provide their answers.

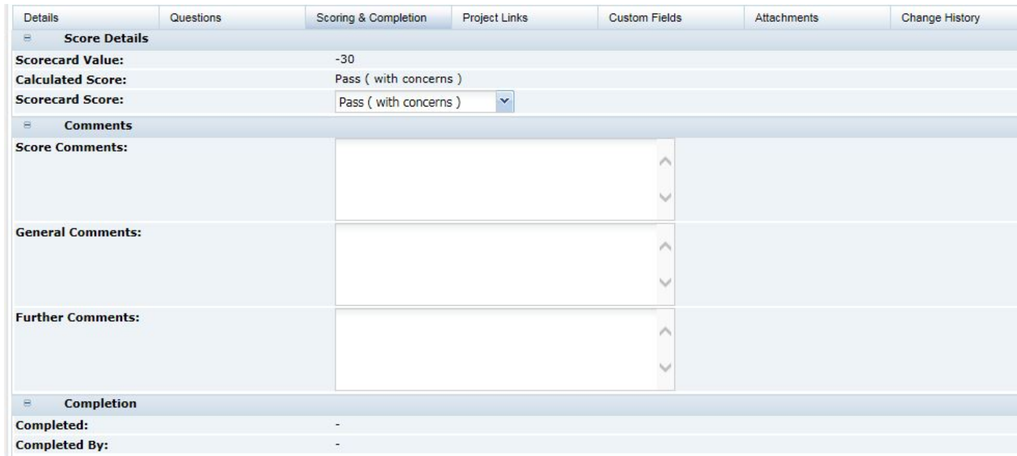
Figure 7-2 Scorecard Questions Page



Scoring & Completion Subtab

To see the scores and completion status for the scorecard, select the Scoring & Completion subtab. The Scorecard Value and Calculated Score are automatically calculated based on the answers given and the scoring rules configured in the scorecard's template.

Figure 7-3 Scoring & Completion Page



Deleting a Scorecard

Scorecards at Future, In Progress, Awaiting Approval, and Awaiting Amendment status may be deleted by the retailer/portal owner user. Scorecards at Future and In Progress status may also be deleted by the supplier user, but only where the scorecard was originally created by the supplier.